



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Merrilee Wineinger  
**Status:** Congressional Candidate  
**State/District:** TN06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/9/2018  
**Period Covered:** 01/01/2017– 05/1/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Carpenters Annuity Trust Fund for Northern California ⇒ Carpenters Annuity Trust Fund for Northern California [OT]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Carpenters Retirement Annuity Trust Fund					
General Electric Company (GE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Harley-Davidson, Inc. (HOG) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Johnson & Johnson (JNJ) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Pfizer, Inc. (PFE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Royce Total Return Fund [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Vanguard 500 Index Fund [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
					\$1,000
Wells Fargo Large Cap Core-A [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Wells Fargo Oceaneering Retirement 401-K plan ⇒ Wells Fargo Oceaneering Retirement 401-K plan [OT]	SP	Spouse/DC Over \$1,000,000		Tax-Deferred	
DESCRIPTION: 401-k plan includes the following funds: PIMCO Total Return Inst. American Balanced R5 Fund Carillon Eagle Mid Cap Growth Fund R5 T. Rowe Price Blue Chip Growth T. Rowe Price New Horizons WF/Blackrock Russell 2000 Index CIT WF/Blackrock S&P 500 Index CIT N5 WF/Blackrock S&P MidCap Indx CITN35 American Funds EuroPacific Growth R5 Oceaneering common stock Wells Fargo Stable Return I15					
Wespath Clergy retirement security & investment plan [MF]		\$50,001 - \$100,000		Tax-Deferred	
DESCRIPTION: Plan includes following funds: stable value (SVF) Inflation protection (IPF) Fixed income (FIF) Ext Trm Fixed Income (ETFIF) US Equity (USEF) International Equity (IEF)					

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
United Methodist Conference Council of Tennessee	Salary	\$0.00	\$8,315.00
General Board of Church & Society	Consultant	\$0.00	\$5,000.00
Oceaneering International, Inc.	Spouse salary	N/A	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Carpenters Annuity Trust Fund for Northern California (Owner: SP)  
DESCRIPTION: Fund includes real estate returns, fixed income & mortgage returns, cash, GTAA, equity funds
- Wells Fargo Oceaneering Retirement 401-K plan (Owner: SP)  
DESCRIPTION: Oceaneering retirement 401-K Plan containing stocks, mutual funds, bond funds

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Yes  No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Yes  No

## CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Merrilee Wineinger , 05/9/2018